



USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 12/19 thru 12/25.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Dec 19, 2014

NATIONAL SUMMARY

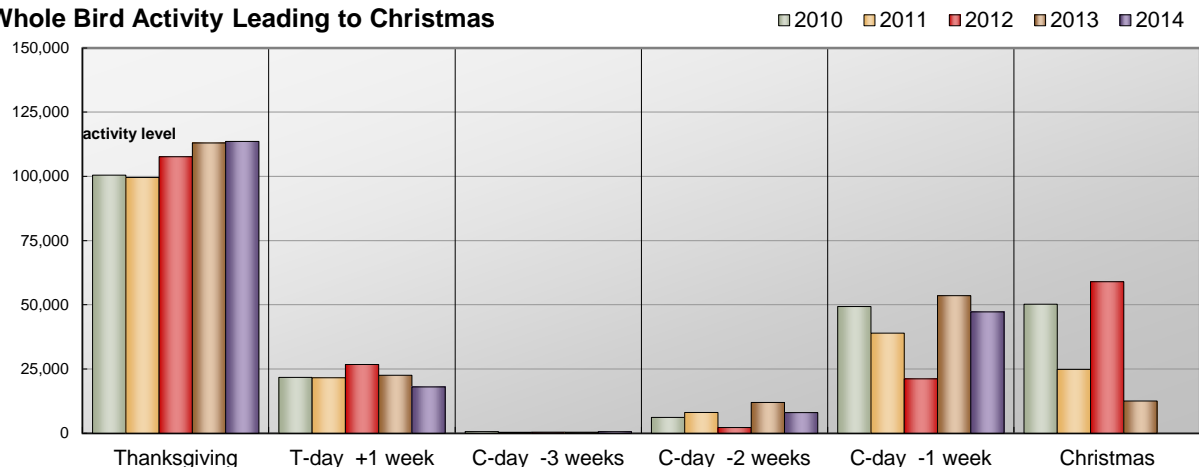
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	80.5% of 22,900 outlets		47.6% of 22,900 outlets		80.1% of 23,200 outlets	
Special Rate ^{4/}	1.8%		1.5%		4.7%	
Activity Index ^{2/}	66,840		27,970		75,550	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	11,640	1.69	1,860	1.57	16,110	1.69
" - Toms	11,280	1.69	1,770	1.57	16,050	1.69
Frozen - Hens	12,370	1.16	2,210	1.04	10,750	1.09
" - Toms	11,970	1.16	2,210	1.04	10,670	1.08
PARTS:						
Breast:						
Bone-in, whole						
Fresh	1,230	2.90	410	3.23	1,870	2.66
Frozen	11,590	1.73	4,590	1.78	11,420	1.66
Split, bone-in						
Fresh	400	2.94				
Rotisserie	630	7.94	1,530	9.48	400	8.40
Boneless, whole						
	40	5.14	70	5.11	20	4.99
Cutlets						
	310	4.82	670	5.19	40	4.99
Cutlets, thin sliced						
			180	5.03	250	4.99
Strips						
Tenders						
			130	4.84		
Marinated Tenders						
	510	4.42	240	4.64	1,120	4.25
Drumsticks						
	210	2.84	260	1.87	60	1.94
Thighs						
	50	2.26			20	2.34
Wings						
	50	2.08	80	2.01	60	1.99
Necks						
	20	1.99	20	2.19	30	1.87
Smoked Drumsticks						
	320	2.74	40	2.82	260	2.24
Smoked Wings						
	320	2.51	40	2.82	260	2.03
Smoked Necks						
	200	2.40			210	1.98
GROUND TURKEY:						
Patties	3,070	3.39	9,320	3.37	5,780	3.41
	70	3.88	270	4.12	150	3.44
Sausage						
	280	3.55	1,290	3.50	930	3.31
85% lean						
	870	3.02	2,400	2.90	810	2.58
93% lean						
	1,730	3.45	4,250	3.28	3,660	3.55
Breast						
	120	4.43	1,110	4.65	230	4.88
Rolls (frsh/frz 1 lb.)						
	320	2.92	940	2.90		
Specialty ^{5/}						
Patties						
			160	3.99		
93-94% lean						
	290	3.99	1,010	4.37		
Breast						
	20	6.29	230	6.99	170	5.99

Note: rolls & specialty not included in ground turkey total and weighted average.

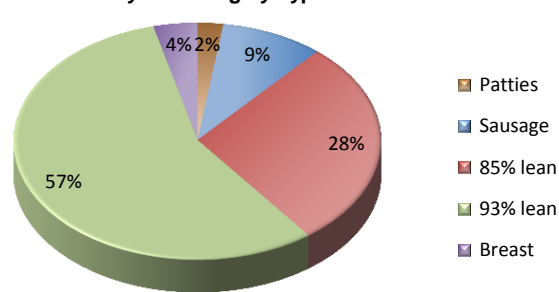
This Week's Turkey Feature Highlights

Retailers are holiday mode and there are plenty of turkey ads this week's circulars. Featuring is less active on fresh whole turkeys, more active on frozen whole turkeys when compared to a year ago; prices are unchanged on fresh, higher on frozen. Offerings on fresh bone-in breasts are less active, frozen more active; prices are higher on both. This is the last hurrah for whole birds and bone-in breasts until the next round of holidays next spring. Rotisserie breasts get less space in this week's circulars compared to last week, but prices are more competitive. Promotions on boneless white parts slow on cutlets, increase on marinated tenders; prices are lower. Offerings increase on dark parts, especially smoked parts. There is less interest in promoting ground turkey this week; over half the features center on 93% lean. Offerings also slow on chubs and specialty grinds. Feature activity increases on deli items; ads are evenly divided between service deli and self-service deli. Only a few stores are featuring private label self-service deli. Deli platters are promoted for holiday parties and gatherings.

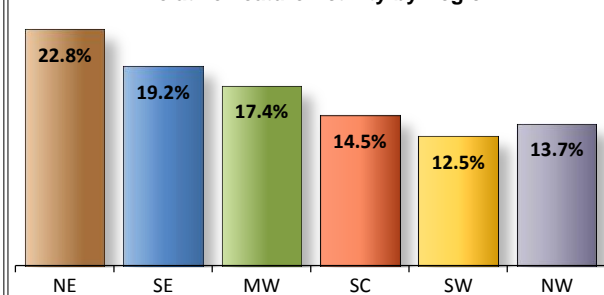
Whole Bird Activity Leading to Christmas



Ground Turkey Featuring by Type



Relative Feature Activity by Region



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/ Activity Index:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). **3/ Stores/Avg:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/ Special Rate:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.). **5/ Specialty:** products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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	NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)			MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)		
Special Rate ^{4/}	86.5% of 4,700 sampled outlets			85.9% of 5,900 sampled outlets			73.3% of 4,200 sampled outlets		
Activity Index ^{2/}	0.0% of stores w/ no-price promotions			3.5% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
	Activity Index = 16,950			Activity Index = 19,490			Activity Index = 11,740		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens	0.98 - 2.29	2,600 1.58		1.19 - 1.99	3,650 1.62		1.29 - 2.49	1,570 1.90	
" - Toms	1.19 - 2.29	2,470 1.56		1.19 - 1.99	3,650 1.62		1.29 - 2.49	1,550 1.90	
Frozen - Hens	0.69 - 1.89	2,440 1.31		0.75 - 1.99	3,940 1.09		0.75 - 1.99	2,790 1.20	
" - Toms	0.69 - 1.69	2,140 1.28		0.79 - 1.99	3,950 1.10		0.96 - 1.99	2,780 1.21	
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.39 - 3.49	450 3.23		3.19 - 3.49	40 3.44		1.69 - 3.19	430 2.43	
Frozen	0.99 - 2.79	2,390 1.92		0.99 - 2.49	3,520 1.67		1.25 - 2.79	1,840 1.82	
Split, bone-in									
Fresh	2.99	290 2.99					2.79	110 2.79	
Rotisserie	7.99 - 8.99	90 8.08		7.98 - 9.99	240 8.07				
Boneless, whole	4.99 - 5.29	40 5.14							
Cutlets	3.99 - 4.99	270 4.72		5.49	40 5.49				
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	4.53	400 4.53		3.99	100 3.99		4.26	10 4.26	
Drumsticks	2.99	180 2.99					1.69 - 1.99	30 1.91	
Thighs	1.99 - 2.99	40 2.33					1.99	10 1.99	
Wings	2.99	10 2.99		1.69	10 1.69		1.69 - 1.99	30 1.91	
Necks							1.99	20 1.99	
Smoked Drumsticks	2.49 - 2.79	320 2.74							
Smoked Wings	2.39 - 2.69	320 2.51							
Smoked Necks	2.39 - 2.49	200 2.40							
GROUND TURKEY:									
Patties				3.50 - 3.99	60 3.86				
Sausage	3.19 - 3.99	240 3.57		3.49	20 3.49		3.29 - 3.33	20 3.30	
85% lean	2.66 - 3.99	570 3.05		2.39 - 3.99	180 3.00		2.98 - 3.29	50 3.08	
93% lean	3.07 - 3.98	1,180 3.50		3.00 - 3.99	90 3.67		2.91 - 3.99	130 3.46	
Breast (99-100% lean)	4.79	20 4.79					3.66 - 4.16	70 3.74	
Rolls (frsh/frz 1 lb.)							2.32 - 3.00	280 2.91	
Specialty ^{5/}									
Patties									
93-94% lean	3.99	290 3.99							
Breast							6.29	20 6.29	



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	SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate ^{1/}	73.3% of 4,200 sampled outlets			75.6% of 2,800 sampled outlets			89.7% of 1,200 sampled outlets		
Special Rate ^{4/}	2.2% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			9.6% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 9,780			Activity Index = 6,110			Activity Index = 2,770		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens	1.29 - 1.99	1,440	1.64	1.49 - 2.29	1,530	1.82	1.49 - 2.19	850	1.81
" - Toms	1.29 - 1.99	1,440	1.64	1.49 - 2.29	1,530	1.82	1.49 - 2.19	640	1.75
Frozen - Hens	0.68 - 2.39	2,260	1.12	0.69 - 1.59	670	1.05	0.99 - 1.69	270	1.20
" - Toms	0.68 - 2.39	2,170	1.12	0.69 - 1.59	660	1.06	0.99 - 1.69	270	1.20
PARTS:									
Breast:									
Bone-in, whole									
Fresh	2.99 - 3.69	90	3.12	2.99	210	2.99	2.89	10	2.89
Frozen	0.99 - 2.49	2,080	1.73	0.99 - 2.49	1,090	1.49	0.99 - 1.99	670	1.50
Split, bone-in									
Fresh									
Rotisserie	7.99 - 9.99	170	8.86	5.99 - 8.99	120	6.25	7.99	10	7.99
Boneless, whole									
Cutlets									
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders									
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties				3.99	10	3.99			
Sausage									
85% lean	2.79	30	2.79	2.79	10	2.79	2.79	30	2.79
93% lean	3.43 - 3.50	60	3.45	2.99 - 4.23	250	3.12	3.43	20	3.43
Breast (99-100% lean)				5.83	30	5.83			
Rolls (frsh/frz 1 lb.)	2.99	40	2.99						
Specialty ^{5/}									
Patties									
93-94% lean									
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 12/19 thru 12/25.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

Fri. Dec 19, 2014

	NATIONAL SUMMARY						NORTHEAST U.S.			SOUTHEAST U.S.		
	This Week		Last Week		Last Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
Feature Rate ^{1/}	67.3% of 22,900 stores		63.3% of 22,900 stores		55.0% of 23,200 stores		79.6% of 4,700 sampled outlets			72.2% of 5,900 sampled outlets		
Activity Index 2/	42,820		38,750		33,410		Activity Index = 11,750			Activity Index = 10,520		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Wtd Avg
SERVICE DELI - Turkey												
Category 1												
Processor Brand	4,320	8.23	4,280	8.47	5,470	7.79	6.49 - 10.99	1,120	8.97	6.99 - 8.99	1,440	7.88
Private Brand	2,860	7.73	2,950	7.57	2,560	7.32	6.99 - 9.49	2,110	7.74	6.99 - 7.99	100	7.37
Category 2												
Processor Brand	3,370	6.37	3,240	6.09	2,840	5.97	4.99 - 6.99	1,290	6.43	4.59 - 6.99	350	5.98
Private Brand	3,690	7.68	4,840	7.01	1,910	7.54	4.99 - 7.99	210	7.46	6.99 - 7.99	190	7.46
Category 3												
Processor Brand	330	4.51	590	4.60	380	4.11	2.99 - 4.99	20	4.06	3.99	50	3.99
Private Brand	410	4.81	260	4.20	200	5.01	3.99 - 4.99	410	4.81			
Turkey Ham												
Processor Brand	120	3.14	360	4.44	650	5.17	2.99 - 3.69	30	3.55			
Private Brand												
Turkey Pastrami												
Processor Brand			340	4.05	40	3.99						
Private Brand			10	2.99								
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,860	7.51	1,300	8.02	1,870	7.22	6.97 - 9.99	960	8.03	6.99 - 9.49	1,870	7.52
Private Brand	2,210	7.60	580	7.06	1,090	6.11	6.99 - 8.99	1,940	7.61			
Category 2												
Processor Brand	230	5.89	220	5.52	140	5.16	5.99	10	5.99			
Private Brand			450	4.99	90	5.99						
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	9,300	3.42	4,780	3.52	7,880	2.99	1.49 - 4.99	1,360	3.36	2.50 - 4.19	2,680	3.58
Private Brand	630	3.28	4,210	3.19	190	3.27	3.29 - 3.50	220	3.46	3.69	40	3.69
Turkey 16 oz												
Processor Brand	1,700	5.24	1,720	5.53	480	4.44	5.99	400	5.99	5.00 - 5.99	1,080	5.01
Private Brand												
Chicken 7-10 oz												
Processor Brand	9,160	3.43	4,520	3.55	7,430	2.96	1.49 - 4.99	1,450	3.37	2.50 - 4.19	2,680	3.58
Private Brand	630	3.28	4,100	3.21	190	3.27	3.29 - 3.50	220	3.46	3.69	40	3.69

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)

Source: USDA Agricultural Marketing Service, Livestock, Poultry & Seed Market News - (515) 284-4460 <http://www.ams.usda.gov/LPSMarketNewsPage>

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USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

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	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)			SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate ^{1/}	56.3% of 4,200 sampled outlets			60.7% of 4,200 sampled outlets			59.6% of 2,800 sampled outlets			71.9% of 1,200 sampled outlets		
Activity Index 2/	Activity Index = 7,390			Activity Index = 6,440			Activity Index = 4,550			Activity Index = 2,170		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
SERVICE DELI - Turkey												
Category 1												
Processor Brand	6.88 - 11.49	740 7.59		6.99 - 9.99	520 8.40		6.99 - 9.49	370 8.54		6.99 - 8.59	130 7.70	
Private Brand	5.99 - 9.99	420 7.89		6.99 - 7.99	230 7.48							
Category 2												
Processor Brand	4.79 - 6.99	1,280 6.31		5.49 - 5.99	70 5.81		6.99	330 6.99		5.49 - 5.99	50 5.61	
Private Brand	5.98 - 7.99	530 6.63		7.99	800 7.99		6.99 - 7.99	1,310 7.83		7.99	650 7.99	
Category 3												
Processor Brand	3.99	20 3.99		5.49	70 5.49		3.77 - 4.97	130 4.02		5.49	40 5.49	
Private Brand												
Turkey Ham												
Processor Brand				2.79 - 2.99	70 2.93		2.99 - 3.49	20 3.29				
Private Brand												
Turkey Pastrami												
Processor Brand												
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	6.58 - 8.98	650 7.10		6.99 - 7.99	190 7.26		5.99	170 5.99		6.99 - 11.99	20 9.82	
Private Brand	6.00 - 8.99	270 7.54										
Category 2												
Processor Brand	4.79 - 5.99	220 5.89										
Private Brand												
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	2.29 - 3.99	1,290 2.99		2.39 - 2.79	2,230 3.34		2.99 - 4.59	1,100 3.55		3.00 - 4.98	640 3.77	
Private Brand	2.99 - 3.69	250 3.29		2.79	120 2.79							
Turkey 16 oz												
Processor Brand	4.99 - 5.49	200 5.03					4.99	20 4.99				
Private Brand												
Chicken 7-10 oz												
Processor Brand	2.29 - 3.99	1,270 2.99		2.49 - 3.00	2,020 3.38		2.99 - 4.59	1,100 3.55		3.00 - 4.98	640 3.72	
Private Brand	2.99 - 3.69	250 3.29		2.79	120 2.79							

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)